



EASY LEGAL PROJECT MANAGEMENT

100 Tips from experts at
the International Institute
of Legal Project
Management



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100 Tips from experts at the
International Institute of Legal
Project Management

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INTRODUCING THE IILPM AND 100 EASY LPM TIPS

At its core, Legal Project Management (LPM) is the application of project management principles and practices to enhance the delivery of legal services. In reality, it is more than that.

LPM combines project capabilities, technology and process improvement methods to increase efficiency and productivity in legal practices.

The **International Institute of Legal Project Management (IILPM)** is a global education and certifying body for the legal project management and legal process improvement disciplines. It promotes legal project management and legal process improvement practices and connects a world-wide community of skilled practitioners.

The IILPM undertakes research and develops workplace tools, competency standards and practice guides to improve legal operations and matter delivery.

THE IILPM LPM FRAMEWORK

The IILPM has developed a standard course syllabus for legal project management training based on the IILPM 4-Phase LPM Framework. All IILPM Accredited Training Providers (ATPs) teach legal project management using this syllabus, although detailed course content and delivery methods vary slightly to reflect the demands of local jurisdictions and the interests of the ATPs.

The IILPM has certified legal project managers in over 50 countries.



4-PHASE LPM FRAMEWORK

APPLICATION OF PROJECT MANAGEMENT TO LEGAL SERVICES

Legal Market, Regulatory and Commercial Factors

DEFINE	PLAN	DELIVER	CLOSE
<ul style="list-style-type: none"> • Matter Type • Parties • Requirements Gathering • Scope Definition • Objectives • Assumptions • Constraints 	<ul style="list-style-type: none"> • Scheduling • Resourcing • Cost and Pricing • Quality Metrics • Stakeholder Analysis • Communications • Risk Strategy 	<ul style="list-style-type: none"> • Task Execution • Monitoring and Controlling • Reporting • Risk and Issues Management • Variations Management 	<ul style="list-style-type: none"> • Client Signoff • Lessons Learnt • Financial Discharge • Archive • Information • Team Reassignment

Productivity Tools and Enabling Approaches

Legal Design, Agile, Workflow Processes, Templates and Technology

Leadership, Interpersonal Skills, Legal Service Culture and Organisational Capability

The Framework is a visual representation of project management applied to the legal sector. Through decades of experience in the legal industry as lawyers and project managers, the IILPM has adapted standard project management methods and techniques to reflect the specific needs of legal practice.

The four phases (Define, Plan, Deliver, and Close) encapsulate standard project management concepts and techniques, but the Framework goes further.

Technology, Lean, Agile, legal design, process improvement, and process mapping all form part of a holistic approach to operational excellence in legal services.

Knowing about particular techniques is just a starting point. To apply these techniques effectively and change the way lawyers work, strong legal project managers also require excellent soft skills, especially communications and leadership.

This eBook presents a collection of 100 tips from our global experts, and reflects the Framework in practice.

The first section provides some general conceptual tips. The remaining sections offer tips organized by the phases of LPM Framework.

We hope these tips help you implement legal project management more effectively and overcome any challenges you're facing.

Enjoy!

GENERAL LPM TIPS



1

Anna Marra

FIILPM

Spain, Italy and
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Building your mindset as legal project managers

Being a legal project manager means learning how to adopt and adapt project management knowledge, tools and techniques. But hard skills alone will make you a mediocre project manager. Being a good project manager means having a mindset that makes you feel comfortable with constant change. This mindset must include, for example, curiosity, the ability to learn, flexibility, the courage to make difficult decisions quickly, lateral thinking, critical thinking, and the ability to lead people and create environments of trust and respect.

2

Todd Hutchison

IILPM LPP

Australia

Process guides behavior

Having a documented process for planning and delivering each legal matter type helps young lawyers follow processes proven by their experienced colleagues. If you want effective behaviors, then documented processes are critical.

3

Cat Moon
FIILPM LPP
USA

Project managers are change managers

If project management is new for your organization, your primary role is to manage the change required to adopt and adapt the LPM 4-phase framework. You succeed in making the change through well-designed communication and planning that involves the people you ask to change.

4

Cat Moon
FIILPM LPP
USA

Just Start

You can integrate LPM today. How? Choose one matter. Apply the IILPM 4-phase framework: Define, Plan, Deliver, Close. Hold an after-action review, learn from what went well (and didn't), and iterate.

Then repeat!

5

Ignaz Fuesgen
IILPM LPP
Germany

LPM is a team sport

Legal Project Management is not the sole responsibility of the Legal Project Manager. The Legal Project Manager orchestrates the application of LPM principles and practices. However, everyone else, including the partners, associates, BD, Marketing, HR, Finance staff and Legal Secretaries, contributes to its success.

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Larry Bridgesmith
FIILPM LPP
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Start where you are and grow as you go

Many of us want to know all there is to know before we begin a legal project. This “belts and braces” approach is common in law. However, to become a more effective legal project manager, it is beneficial to eliminate waste and improve processes wherever you find them.

You will begin to enjoy early victories that will create more competent skills as you grow in your LPM knowledge and experience.

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Legal Project Management Office (LPMO)

Todd Hutchison
IILPM LPP
Australia

A Legal Project Management Office (LPMO) is a support function for the legal practice. It ensures legal team members are trained and coached in legal project management and oversee the provision of technology, systems, and processes that effectively support legal matters.

The LPMO collects lessons learnt and makes sure that improvements are embedded back into the practice.

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Antony Smith
FIILPM LPP
UK

Building resilience

Legal project managers need to develop resilience to bounce back from the inevitable setbacks they will encounter when managing legal matters. You can build up your store of resilience by looking after your health, fitness, diet and thinking about positive aspects of your life that helps redress the balance when the going gets tough.

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Team thinking brings innovation

In the same way our work should be innovative, so too should be our approach as we structure our teams and define what it looks like to be creative. By including those with different experiences than our own, we bring new thinking to the planning of legal matters.

This is why using external legal process experts to work with us to define our process will help critically assess what we do and what we could do. Differing thinking brings new ideas and creativity.

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Avoid the term “non-lawyer”

Remove “Non-lawyer” from your vocabulary. The legal profession is one of the few which divides the world into two parts: lawyers and non-lawyers. How many non-plumbers do you know? Physicians work alongside physician assistants, nurses, nurse practitioners and many other specialities. Lawyers need to learn how to value the many roles in legal service delivery respectfully and with dignity.

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Aileen Leventon

FIILPM LPP

USA

Import practices from Lean

Beware of the successful legal project that does the wrong things but still gets results.

Lean process methodologies enable you to create the optimal work plan and assure that you are doing the right task, in the right order, with the right people.

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Take time to research

Research to learn what others are using to succeed. Too much duplication of effort and too little sharing of knowledge means we keep reinventing the wheel all the time.

Challenges often have almost universal commonalities, and by leveraging the experiences of others, we can go faster and farther together.

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FIILPM LPP
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Collaborate with other disciplines

The complexity of legal service delivery today requires many professional disciplines to work together. Lawyers possess a skill set unique to their training and license. They rely on the unique skill sets of other disciplines as much as lawyers rely on their own. Technologists, data analysts, project managers, system engineers, process improvement experts and many other specialists are critical to providing great client service.

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Antony Smith
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The need for assertiveness

You will rarely see assertiveness listed as a requirement in job advertisements for legal project managers. It's a pity, because I think this is a required attribute along with its cousin, tact.

Becoming an unquestioning servant to law firm partners and clients does not necessarily help anyone in the long term. Sometimes legal project managers need to push back to manage expectations properly. This requires assertiveness.

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Managing the risk to have critical people on board

Critical people in the law firm provide a high risk to the business continuity. Look at options like colocation, formal training, documentation, coaching, succession planning, technology replacement, simplifying complex tasks, outsourcing, insurance, rotating staff and recording what they do to reduce or eliminate the risk.

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Todd Hutchison
IILPM LPP
Australia

Fixed price matters best align to desires

Fixed price legal services better align to the client's desire for productivity, transparency and "no surprises". With fixed pricing, lawyers and clients focus more. Both parties focus on high quality, fast delivery and delivering only on promises made. Eliminate your client's fear of opening up a bill with fixed price services.

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Harald Evers
IILPM LPP
Germany

Engaging a new client

First discussions with a potential client:

- Prepare yourself for the interview and search for details in registers, files and on the internet;
- Be silent, be silent, be silent and listen carefully;
- Make an initial prognosis based on a decision tree, determine which experts should be involved and what it costs, and don't promise too much but follow the client's request with great care.

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Build trust through effective delegation

Build trust through effective delegation. A prevalent challenge for lawyers is their inability to delegate tasks to the broader team effectively.

Try to resist the desire to do everything yourself and learn how to delegate to your team by strengthening the trust.

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Larry Bridgesmith
FIILPM LPP
USA

Build team skills

LPM practices form powerful and empowered teams. Great teams communicate, collaborate and learn from each other. The process of planning, managing and learning from the conduct of legal matters supports the development and training of new attorneys and other legal professionals. Equally important is the team-building impact of LPM.

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Commercial decisions are always shaped by law

Business decisions are made within a legal framework that managers must observe due to the principle of legality. From an organizational point of view, ensure you do not implement business decisions before consulting independent legal and compliance advisors. Otherwise, managers can't act on an informed basis or in the company's best interest or good faith.

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Revisit your legal software

Revisit your legal software and investigate its functionality before buying new software. Sometimes lawyers already have the 'new' functionality they require somewhere in their existing software set.

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Kanban or Scrum?

When predictability is low, you might decide to use an agile approach, which means delivering fast and continuous value to your client. The two most frequently used methodologies are Kanban and Scrum. Which one should you choose? Every case and every firm or law department is different, so it depends. Scrum applies where there are large projects, with work done in time-boxed sprints, while Kanban applies during the delivery of many projects. Kanban helps monitor the continuous flow of work through the legal team.

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IILPM LPIP
Canada

Process enables consistency

Firms need to create strong processes to establish and enforce consistency when implementing and delivering effective legal project management. In short, you need to have a rigorous process for delivering your legal project management services.

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Legal Design Thinking

Legal design thinking is not just visual management. It is a methodology based on five steps: empathize, define, ideate, prototype and test. Use this methodology to approach a case from the user's point of view. The empathize phase is fundamental to understanding the problem by putting on the shoes of your user (clients, lawyers, judges, and more). Once you get the problem and define it, the next step is to find the solution. Once you have identified a potential solution, prototype, test and deploy quickly and then monitor feedback from users.

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Growing influence of legal project managers

In the IILPM's 2019 survey of legal project managers, only 28% of respondents felt they were involved early enough in matters to help define scope properly, whereas that increased to 59% in the 2020 survey. Similarly, in 2019 only 33% of respondents felt confident they were the primary point of contact for all operational issues concerning legal matters, whereas in 2020, the figure rockets to 76%. This is evidence of the growing maturity of legal project management and the influence of legal project managers on matter management.

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Matching legal teams

Behavioural profiling can provide key insights to personal performance, which legal team members complement each other the best, and how individuals can work more effectively in teams.

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David Skinner
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Canada

Putting time to value-adding use

Process improvement projects help eliminate the things lawyers typically write off, because a well-designed, optimized process will waste less time and effort.

Tell the sceptics that your project will reduce write-offs by ensuring the right people are doing the right work at the right time and cost, so that they won't waste so much time. Instead, people will be putting their time to value-adding use—that you can bill!

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Plan legal matters in phases

In the IILPM's 2020 survey of legal project managers, 40% of respondents said they regularly worked on matters which offered a fixed price per matter phase, 30% most commonly worked on matters which were priced according to a single fixed fee per matter, while 26% worked on matters priced according to the standard billable hour.

Planning matters by phases helps with both project delivery and pricing.

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Not all business development is the same

A part of the senior legal practitioner role is to bring work into the firm. Behavioural styles help lawyers understand their best-aligned business development initiatives.

Not every lawyer wants to be out networking. Strategic board roles, article writing, pro-bono engagements and other strategies across the team can mean a multi-layered approach to building the legal practice.

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Define and refine the definition of success

Successful planning and executing of a matter depends on the definition of success. Stakeholders may have differing views that may evolve over the course of the matter.

Be sure that you confirm and refine the definition with a shared understanding as the matter evolves.

DEFINE



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Adopting agile when unpredictability is high

Have you ever said to yourself, “...Now, where do I start from?” In some legal projects, unpredictability is significantly high. In these cases, a waterfall-driven approach is unlikely to be the best one. Project management is about choosing the right methodology for the best delivery. An agile approach based on fixed-length project iterations or ‘sprints’ can help manage projects with a high degree of unpredictability.

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Identify Smart Objectives

Before planning your project, spend time identifying the project objectives with your client. It is a very valuable use of time, which has a direct impact on legal project results. Objectives should be Specific, Measurable, Achievable, Realistic and Time-bound (SMART).

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Matter Definition

Have conversations with your clients to understand what they want. Do you know why the client has come to you for this matter? Where does your legal work fit into the client's commercial objectives? What level of service is the client expecting, especially regarding communications?

Use answers to questions like these to help you scope and plan the matter to ensure successful delivery.

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The real project

Your legal project is always part of a bigger plan, usually a business plan. Be sure about your goals for the bigger plan.

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Harald Evers
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Germany

Clarify responsibilities

Before you take on the responsibility of a Legal Project Manager, ensure you have clarity on the project roles and definitions. Know who is the legal project manager, sponsor, executive, and who is part of your team, including who is responsible for planning and providing resources, including consultants. The perfect Legal Project Manager is ready for any surprises and open to engaging the correct stakeholders to help solve problems.

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David Skinner
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Process guides behavior

If you want to build a culture of continuous improvement, be a coach not a cheerleader or a consultant.

A cheerleader encourages and congratulates the team on work they've done, but teams need more. They need guidance and accountability.

A consultant swoops in from the outside and does the work. It's useful, but won't help if you're trying to build skills and culture across your organization.

A coach guides the team as they do the hard work themselves. Team members build skills they can apply to their next projects. They become authors of change, proposing solutions that work for them and increasing your chances of success.

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The Golden Triangle

Every project has limits and constraints. The Golden Triangle expresses the triple constraints of scope, time and cost.

If the scope of your project increases, the other two axes (time and cost) usually suffer variations. That is particularly relevant in the change of scope; ensure that you communicate to the client that any change of scope can impact the time and cost plans.

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Convert your terms sheet into a project charter

If you add to your terms sheet the description of the reasons for the project, objectives and constraints, project scope, who the main stakeholders are, a general overview of time and budget, risks identified, project team, and who is responsible or/and sponsor for the project, you will convert it into a Project Charter.

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What the IILPM survey noted on scoping

The IILPM 2019 survey of legal project managers showed that 72% of legal project managers felt they were not involved early enough in new matters to help define the scope.

Therefore, legal project managers must invest the time and energy showcasing their skills and gaining the trust of their lawyer colleagues to become more effective members of the legal service delivery team.

PLAN



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Plan appropriately

You can't avoid the need to plan, so it's best to learn how. Whether you follow predictive project methods (traditional project management) or adaptive methods (agile) you will need to plan matters properly.

Agile is not the absence of planning. It is a lighter and more flexible approach to planning.

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Time on project planning speeds delivery success

Spend more time on legal project planning. Each hour you spend in project planning can be equivalent to five hours of lost efficiency in project execution.

By spending time planning, you can increase productivity, reduce inefficiencies and improve your work environment and matter success.

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Time spent planning is never wasted

Research shows that high-performing project managers spend twice as much time on project planning than their less-successful peers. So, learn from the best and spend more time planning your legal projects.

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Scope in phases

Break more complex matters down into phases when scoping. Usually, it is much easier to scope phases of activity closer to the beginning of the matter than those further away. You will probably be more confident about the accuracy of early-phase scoping than later-phase scoping. Nothing wrong with this: use realistic phased scoping for the basis of informed discussions with clients.

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If you can't "Process Map" it, performing the matter is difficult

Visualizing a project's path in the form of a process map helps the team improve the flow of the project. Process mapping provides insights into executable phases and tasks, those responsible, when to do them, and in what sequence. This reduces wasted effort and improves the quality of the team's execution. The team can complete tasks in sequence and others in parallel. Reducing the project to a process map format takes the guesswork out of legal project execution.

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Use a kanban board

The kanban board is a simple workflow visualization often displayed on an office wall or in electronic form, including the 'To Do', 'Doing' and 'Done' tasks. Once a team member finishes a task, they go back to the 'To Do' list and start the next job. In this way, everyone can see who is working on what.

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Plan for project changes (variations)

You can rarely complete legal projects without experiencing deviation from the plan. Expecting project plan variances is the best approach to dealing with them when they occur. Some changes can be anticipated and planned. Other changes in the plan arise in unexpected ways. Legal project planners have skills that enable them to adjust a project plan to meet the necessities of law practice.

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Manage the scope

Unauthorized scope creep can be avoided when a variation (change) management process is in place.

Without properly managing the scope and any proposed changes, lawyers can end up doing work without receiving adequate financial compensation.

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Break your project down into small activities

Continue to break down your project into tasks and activities. An essential tool to help project managers do this is a Work Breakdown Structure (WBS) chart.

Using a WBS means that project activities are easier to budget, schedule, assign, track and deliver.

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Graphical planning tools

A picture can be worth more than a thousand words. A Gantt Chart that plots tasks on a calendar is the best-known graphical planning tool in legal project management.

Often, when plotting tasks along a timeline, the realization occurs that you do not have as much time as you initially thought. That's OK. The plot has served its purpose. Time to re-plan already!

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Schedule compression techniques in time management

Do you ever face a critical delay in your project? If it happens, try to shorten the schedule by using the methods of fast-tracking and crashing.

In fast-tracking, the goal is to review the critical path to determine if you can perform sequential activities parallel or partially parallel to each other. In crashing, you aim to add extra resources to the project.

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Three-point estimating

No one likes giving estimates because these tend to be considered 'wrong', yet they aren't supposed to be precise.

For a quick start, try 3-point estimation. Estimate 'best case', 'worst case' and 'most likely case' outcomes of whatever you estimate.

Then add each estimate together and divide by three. This is a simple and effective way to start estimating.

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Gustavo Carmona
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Create a realistic schedule

Your professional responsibility as a Legal Project Manager is to create a realistic schedule before presenting it to the client. You must be sure that your schedule is achievable and considerate of all the other legal project constraints.

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Becoming comfortable with uncertainty

Often, the precise nature of legal service work and the tasks and activities are unknown when first making matter plans. Working with uncertainty is not a valid excuse for not planning at all. The planning process itself should help the legal team clarify areas of uncertainty by providing a structured approach to things such as the estimated duration of work and the management of risks.

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Ignaz Fuesgen
FII LPM LPP
Germany

Utilize visualization

You can best handle the complexity of long and parallel sequences of tasks and activities by applying visualization techniques. Examples include Gantt Charts, which quickly illustrate the “lay of the land” and highlight opportunities for identifying more effective matter delivery.

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UK

List client tasks as standing items

Often lawyers are waiting for their clients to do something (such as provide documentation) to progress matters. An easy and effective way of reminding clients of their obligations is to list them as standing items in matter status update reports, which are shared regularly and consistently as per the matter communications plan.

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Work package definition

Lawyers sometimes find it challenging to get their colleagues to do things on time and to the right quality standards. In project management, a 'work-package definition' allows project leaders to set out clearly to their project team members what and when something is required, and the criteria for determining when tasks are complete. I am not suggesting lawyers issue total 'work-package definitions' to their colleagues, but adopting a work-package mindset helps add clarity to sometimes difficult conversations with colleagues.

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People want different levels of information

A person's behavioural style often influences what level of information they want. This can be discussed upfront and documented in the Communications Management Plan. This allows parties to agree with each other and avoid providing too little or too much information.

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Prepare for effective client feedback

Asking clients for feedback as part of the matter debriefing is often an unstructured and ad hoc exercise. Comprehensive preparation based on a thoroughly orchestrated and transparent approach, assisted by internal checklists, not only produces valuable insights and comparable data for benchmarking purposes, but also avoids wasting client time.

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Hold matter kick-off meetings

On the one hand, most lawyers scorn the idea and practice of matter kick-off meetings. They would prefer to 'just get the work done'. On the other hand, many of those same lawyers are quick to complain that collaboration and cooperation between legal service delivery teams are poor.

The fact is that matter kick-off meetings significantly improve the chances of developing engaged, responsive, and collaborative teams.

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Effective delegation authority

Applying a Legal Scrum approach to matter management offers an effective way to empower associates and foster accountability. With its rigorously defined roles and the carved-out mandate for the legal team, which will mainly consist of associates, they can be delegated authority to progress their contribution to the legal matter management.

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Communicate the value proposition in the client fee

Value pricing is simply maximizing lawyer revenue based on the real or perceived return to the client for the investment they are making.

Client fees consist of adjustments made to margins above the direct and indirect costs. It is vital to make the client aware of the firm's value proposition so the value is communicated and recognized.

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Human resources are productive just 80% of their time

Have you ever been too optimistic in evaluating your project costs?

Try to be realistic about how much a resource will cost. In a law firm, the leading resources are the lawyers themselves.

Assume that resources will only be productive for 80 per cent of their time, and remember that those lawyers who work on multiple projects take longer to complete their work because of time lost switching between tasks.

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Australia

Identify and resolve issues fast

An Issues Register helps the legal team identify and alert others of issues that can stop, slow down or negatively impact the delivery of the legal matter.

It simply provides an avenue to define the issue, confirm its priority, create the remediation plan, allocate it to a resource to progress and track it to resolution.

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Assessing impact and probability will help you prioritize risks effectively

Are you able to identify and prioritize risks that might affect your project performance? Make a list of risks that are related to your project activities. Then analyze your metrics to determine the probability of each risk occurrence and impact on your project. If the probability and impact are high, you will need to prioritize the management of these high-risk events. In PM, we use a tool called a Risks Management Matrix to help with this.

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Consider the wider risks

An individual's thoughts are influenced by what they are interested in and focused on. This can bias their thinking about risks. When considering the risks of a complex legal matter, utilize a list of risk categories (e.g., financial, compliance, technology, stakeholder etc.) that will prompt broader thinking.

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Manage risks early

Law firms are constantly faced with risks when seeking to deliver matters on time and to budget. Legal Project Managers should identify risk events that can inhibit the delivery of the legal matter and take action to treat them. If risks are identified and treated early, lawyers can avoid wasting time trying to put out fires that may occur later.

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Eliana Fonseca

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Be proactive in managing risks

Risk Management is a must within LPM practice. The best way to visualize the potential risks is by using a risk matrix that assesses the likelihood and impact of them happening. To determine the "risk tolerance" and to have a response plan in place are also best practices for forewarning undesirable outcomes.

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Prioritize mitigating reputational risks

It is worth considering reputational risks as a top priority during the initial conflict check and matter definition (inception). Research shows that brand and reputation have correlation scores ranging from 60% to 90%, which shows that perceptions of both tend to move in the same direction (Zandan, P. and Lustina, M. 2016).

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Identify the area affected by the risks

When you identify the risks that can threaten your project, try to understand which area will be affected the most. Will the new event affect the scope of the project? By what percentage? Will the scope of the project still be of interest to the client? Or does the new event create a deviation in time or cost? Maybe the possible risks might lower the quality of the job or create the need to involve more human resources. Understanding the affected area will make it easy to decide how to manage the risk before any event occurs.

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Germany

Litigation decisions

Demanding litigation is one of the most challenging areas of legal advice and LPM. Here are four things to make it easier:

1. Develop the drafts at an early stage (not last-minute) and give your client risk information at an early stage, preferably with the help of a decision tree for visualization.
2. Based on the decision tree, promptly coordinate the relevant questions about the facts with the client and the necessary information requested.
3. Following the risk analysis, you can make a realistic budget agreement with the client, and agree on the most relevant litigation objectives.
4. Involve your specialist colleagues and external consultants at an early stage, and define the individual specialist questions to be solved. Make sure that you can pull their input together on time.

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Document anything you do more than once

Any time you're doing something more than once, you've got a process. Write it down. Written processes prevent errors and enable you to delegate tasks more efficiently and effectively to the right people. This allows you to select the people who have the time and skills to do the work correctly, quickly, and more cost-effectively than you.

DELIVER



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USA

Unleash the power of cognitive diversity

Research into human achievement proves that the more diverse the team, the greater the innovation they can generate. Cognitive diversity results when different people with different skills, training and experiences learn to collaborate as a team. A group that is composed of people with similar perspectives on a problem tend to see similar solutions. Collaboration is the key to great team outcomes.

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Todd Hutchison
IILPM LPP
Australia

Provide clarity through communications

In the absence of information, people tend to make up negative stories. Just consider when you hear the Managing Partner wants to see you – you may automatically think it is something terrible. The flow of information to the right person at the right time and in the right format eliminates rumours and manages expectations.

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Anna Marra

FIILPM

Spain, Italy and
Latam

Engage the project team

Have you ever seen how some people can become easily disengaged from the legal project? Use a Responsibility Assignment Matrix to let your team understand their role and responsibilities in each task of the legal project. Clarity helps with accountability.

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Anna Marra

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Build “psychological safety” to get performing teams

Do you ever have a feeling of insecurity when you are working in a legal team? Does this insecurity lower your team’s performance? Usually, it does. If so, try to build an environment of “psychological safety” in which team members feel safe for interpersonal risk-taking. Only in a trust-based environment can you get the best performance.

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Todd Hutchison
IILPM LPP
Australia

Take control of stress

Stress is a real or perceived loss of control. Having the right tools in place gives you a better sense of control. When you document legal matter issues, you can then determine a remedy and resolve them. It places you in a position of control. Without using tools and documentation, you may become overwhelmed.

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Todd Hutchison
IILPM LPP
Australia

Negotiating positions

When negotiating, it is essential to look at providing a win-win outcome. To avoid being overly emotional during the negotiation meeting, preplan your three positions: your target (ideal) position, your acceptable (compromise) position, and your walk-away (unacceptable) position. Then in the negotiation room, you can focus on the opponent's perception of value.

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Aileen Leventon
FIILPM LPP
USA

Obtain clarity on roles and responsibilities

Lawyers and other members of the legal team benefit from clarification of their role. Ensure every task in a project has a leader who assures that the right person is doing the appropriate level of work to achieve the goal associated with performing the task.

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Antony Smith
FIILPM LPP
UK

Be clear about the purpose of team meetings

It often helps to flag up the purpose and rationale of different kinds of team meetings. This sets expectations and keeps discussions more focused. Status update meetings, meetings where technical knowledge is shared, problem-solving meetings and matter/stage review meetings are different. Planning and designing these different types of meetings helps create teams that are engaged and productive.

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Ignaz Fuesgen
IILPM LPP
Germany

Collect only meaningful data

LPM may give legal service providers and clients access to an enormous amount of data. One should carefully consider: is the data really assisting in meeting the specific matter objectives set out during the Define phase (monitoring) and improving the delivery process of services (insight and foresight)? In many instances, 'less will be more' and exception reporting can be more useful than simply displaying overwhelming amounts of information.

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Larry Bridgesmith
FIILPM LPP
USA

Fail fast and recover quickly

Fail fast, fail often and fail small!

Failure is inevitable but most often unwelcome in law. Failure is not the same as a professional responsibility lapse or a legal malpractice claim. We "fail" every time something doesn't work out as we planned. Recognizing the inevitability of these missteps can allow us to plan for them and recover more quickly. Developing risk assessments and planning for the best response will minimize the potential of significant failures that we want to avoid.

82

Harald Evers
IILPM LPP
Germany

Progress over perfection

Always try to communicate a clear project structure and progress objectively with all imponderables and subjective sensitivities, involving and convincing all stakeholders.

In your client's interests, be fair to everyone; attach importance to achieving results quickly, openly and in a balanced manner. Do not pursue perfect goals favouring your client; instead, focus on bringing the project to a balanced conclusion.

83

**Karen Dunn
Skinner**
IILPM LPIP
Canada

Self-reflection brings fresh eyes

Asking WHY you work the way you do will help you see your work through fresh eyes. We are too often stuck in our own "normal." We work a particular way because that's the way we have always worked. Often, it's only by looking critically at why you work the way you do, that you'll discover opportunities for improvement.

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Todd Hutchison

IILPM LPP

Australia

Task allocations in legal software

Process guides behaviour. When the legal team utilizes a platform that provides task allocation and tracking functionality, the whole team works in unison to efficiently deliver the legal matter.

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Todd Hutchison

IILPM LPP

Australia

Body language speaks volumes

Did you know that Albert Mehrabian found that the likeability for a person was based on:

- 7% verbal words
- 38% tonality of voice
- 55% body language

The fact that body language and voice tonality have such a higher ratio than the words used helps explain why you can see through people when they are speaking dishonestly – there are other factors at play.

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Harald Evers
IILPM LPP
Germany

It's a matter of transparency

Accounting begins with an explicit agreement at the start of a mandate to consider: who is being paid for what?

A legal matter needs precise budget planning internally. In the event of changes in the mandate, have a dialogue with your client to adjust the pricing. Prompt (monthly) billing is standard in almost all other industries. Any misunderstandings are identified promptly.

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**Nicolene
Schoeman-Louw**
IILPM LPP
South Africa

Efficient comms builds rapports

A common complaint you often hear against lawyers is poor reporting. Ensuring that you identify interested parties and their preferred method of communication is critical in building strong relationships with clients.

CLOSE



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Larry Bridgesmith
FIILPM LPP
USA

Improving legal processes results from after-action reviews

It is tempting to move on to the next legal matter when you finish a legal project. However, a brief "lessons learnt" exercise with the legal project team can provide invaluable insights into performing the next similar legal task. Simply asking "What went well?" and "What can we improve?" allows the team to share their various perspectives on how they can implement project improvements.

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Antony Smith
FIILPM LPP
UK

Don't look for software solutions too soon

There is plenty of great software available for legal teams. However, it is usually best to improve your team skills, processes and procedures before implementing software to try and fix your problems. Get as far as you can without using software, and then implement software tools to turbo-charge your practice.

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Todd Hutchison
IILPM LPP
Australia

Project management is often more about building the right norms for people to excel than managing time, costs and resources.

Why do some teams perform better than others, even if they all are characterized by similar individual intelligence? According to many researchers, the key is to establish the right group norms or behaviours. Focus your effort on giving your team the right norms to raise and exploit its collective intelligence.

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Antony Smith
FIILPM LPP
UK

Brand the LPM methodology to increase its awareness

After establishing which LPM techniques and methods work best for you and your organization via a low-key 'soft' roll-out of LPM, consider more assertive marketing to promote it. Brand your preferred LPM approach, perhaps even using a unique logo, to help increase your LPM visibility with colleagues and clients.

92

Antony Smith
FIILPM LPP
UK

Don't take feedback personally

Successful project managers value, and therefore seek out, regular feedback about all aspects of their projects. Lawyers tend to shy away from seeking input from colleagues, as they often equate negative feedback about matter progress with negative feedback about their performance.

Separate 'personal performance' from 'project (matter) performance'. Don't take criticism personally. Step back and look objectively at how matter management can be improved considering feedback received.

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Larry Bridgesmith
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USA

Legal data analytics

A precious benefit of a systematic LPM process will be the data it generates about the norms and variations in the management of legal projects.

Digital data has become the "new oil" in the age of Artificial Intelligence and Machine Learning. Data analytics will prove to be increasingly valuable in the management of legal matters.

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Todd Hutchison
IILPM LPP
Australia

Maintain quality standards

Never walk past or accept sub-standard quality. Always seek to improve all aspects of what you do and make continuous improvement simply a way you do business.

95

Antony Smith
FIILPM LPP
UK

Early returns on LPM processes

Often I am asked at what point law firms and in-house legal departments first see the value by applying legal project management.

Generally, good legal project management practices become first noticeable due to improved communications, both within legal service delivery teams and, most importantly, with clients.

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Larry Bridgesmith
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USA

Learning lessons

The best tool for improving your processes and discovering efficiencies is an after-action review. When the team looks back at what went well and what could have been better, the door to improvement opens wide. Adjusting the project plan with lessons learned empowers the team to enhance its performance.

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Antony Smith
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UK

Keep team members fully engaged

When the end of a project, especially a long project, is on the horizon, it can sometimes be challenging to keep project team members fully engaged. To counter this, start your 'close' phase as early as possible in the context of the project. Then use the close phase to inject more energy into the project.

For example, during your close phase, you and your team members could change how things (such as status meetings or status reports are done) can help keep everyone on their toes as the team works towards successful project completion.

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Todd Hutchison
IILPM LPP
Australia

Adjourn and think of your mental health

In the team development model, Dr Bruce Tuckman talked about the adjourning phase when the team disbands. This is one of the most important stages for mental health, when we stop and look back at our achievements. Only then do we have a sense of accomplishing something.

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Todd Hutchison
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Australia

Reflection breeds corporate knowledge

Lessons learnt throughout the legal project can be captured in the lessons learnt register. At the end of a complex matter, it is worthwhile to reflect on those lessons and make recommendations for future improvements.

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Ignaz Fuesgen
IILPM LPP
Germany

The 5 Whys - digging deeper

Sometimes, finding the root cause of an issue in a review isn't trivial at all. Applying the 5 Whys method may greatly assist. This straightforward activity consists of asking yourself (or others) five times in a row the question "why" concerning an identified issue. Teams usually pinpoint the source of the issue buried by other problems. It's easier to find a solution once the root of the trouble is identified.

EASY LEGAL PROJECT MANAGEMENT

The easy LPM tips series will continue – keep a lookout for them on LinkedIn and Twitter!

THE INTERNATIONAL INSTITUTE OF LEGAL PROJECT MANAGEMENT

Join the Global IILPM Community

Join a worldwide association of legal project management experts, including lawyers and professional project managers.

We provide education, internationally-recognized qualifications, global certifications and ongoing support to build your legal project management competency and promote your expertise.

Quality project management helps law firms remain profitable through:

- clear scope development and change management
- managing their own risks and being responsive to project issues;
- consistently delivering quality outcomes even during peak workload periods;
- better utilizing technology and process improvement methods;
- building stronger teams with clear accountabilities; and
- improving client and key stakeholder relationships.

We strive to bring together and support the growing community of legal project practitioners and enable a more standardized approach to LPM best practice worldwide.

—Todd Hutchison, Chairperson

CERTIFICATIONS IN LEGAL PROJECT MANAGEMENT AND LEGAL PROCESS IMPROVEMENT

The IILPM provides a pathway to robust, internationally recognized certifications. Our graduates stand out in a busy marketplace as trained in legal project management.

Our Certificates

Legal Project Associate™

The Legal Project Associate™ (LPA) certification provides graduates with introductory knowledge about Legal Project Management, so they can either support legal matters or work in the legal matter project team as a team member (not the legal project manager).

To apply for the LPA certification, an applicant must have successfully completed either the 2-day (14-hour) 'Applied Legal Project Management' course delivered by an IILPM Accredited Training Provider, or the online equivalent.



Legal Process Improvement Professional™

The Legal Process Improvement Professional™ (LPIP) certification recognizes a person with applied knowledge about process improvement techniques in a legal setting, contributing to increasing productivity and efficiencies in legal operations and the legal matter process.

To apply for the LPIP certification, an applicant must have completed either a 2-day (14-hour) 'Applied Legal Process Improvement' course delivered by an IILPM Accredited Training Provider or the online equivalent.



Legal Project Practitioner™

The Legal Project Practitioner™ (LPP) certification recognizes a person with practitioner level knowledge about Legal Project Management who can successfully lead legal projects as a legal project manager. This is the premier global certification for a legal project manager.

To apply for the LPP certification, an applicant must complete at least a 3-day (21-hour) IILPM, an 'Advanced Legal Project Management' course delivered by an Accredited Training Provider or the online equivalent, and must have the prerequisite workplace experience.



BIOGRAPHIES



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Larry is a lawyer in Nashville, Tennessee with over 30 years' experience practicing law in the fields of labor, employment, and dispute resolution. He holds a Six Sigma Green Belt certificate and is an adjunct professor in legal project management, conflict management and mediation at Vanderbilt University School of Law, The Nashville School of Law, and The Arizona State University Sandra Day O'Connor School of Law.

Larry cofounded the Program on Law and Innovation at Vanderbilt School of Law. He is a founding member of the IILPM and sits on the IILPM's Global Advisory Council.

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Gustavo is a consultant and trainer in Project Management, Marketing and Digital Transformation for legal service providers. He has a degree in Law and International Affairs, a Master's Degree in Commercial Law from the Universidad Católica Santa María La Antigua in Panama, and a Postgraduate Degree in Strategic Management from Centennial College in Toronto, Canada.

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Karen is the co-founder of Gimbal Lean Practice Management Advisors and the LeanLegal® Academy. She's a Lean Six Sigma Black Belt and an attorney with experience practicing in Canada and Europe. Karen combines her deep understanding of the legal industry with her training in Lean Six Sigma to provide practical solutions to competitive and budgetary pressures facing the profession.

Karen is a global leader in practice innovation, Global Advisor to the IILPM on Legal Process Improvement, and a member of the IILPM's Global Advisory Council.

An Accredited Training Provider, she offers LPM and LPI training and coaching in English and French through live, virtual, and on-demand courses.

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Harald is a German lawyer specialized in corporate-commercial law and M&A. He has professional experience in-house and as an external legal advisor within law firms and global multi-professional service firms. He is also a certified Data Protection Officer.

Harald has been an IILPM Accredited Training Provider since 2018. He teaches public and private courses on LPM for organizations and law firms, speaks at conferences, Europe's largest New Legal conference, and has authored articles on LPM in various German publications. He's applied his LPM knowledge to M&A projects, mass litigation, data protection matters, and key organizational operations of a multinational listed company.

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Eliana is an Argentinian lawyer with an international career focused on the Middle East. She is currently based in Dubai, United Arab Emirates (UAE), where she works as a legal counsel associate for one of the leading retailers of luxury watches and jewelry in the region.

Eliana delivers LPM training to Dubai-registered lawyers through the Continuing Legal Professional Development Programme administered by the Government of Dubai Legal Affairs Department and actively conducts private and public coaching sessions and training programs for legal professionals in the Gulf Cooperation Council region.

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Ignaz Fuesgen is Managing Director of smartvokat, a Legal Engineering and Tech startup. With more than 20 years' professional experience at international law firms and management consultancies in Europe and Sub-Sahara Africa, including KPMG/BearingPoint, Clifford Chance, Allen & Overy and Deloitte Legal, he advises clients on the transformation of legal services with respect to Legal Services Portfolio Management, Legal Project Management, and digitisation. His passion lies with innovations related to access to justice.

Ignaz is an Accredited Training Provider and member of the IILPM's Global Advisory Council, as well as a certified Scrum Master. He holds an Executive MBA from Carlson School of Management (Minneapolis, USA) and a Master of Business Administration from the Vienna University of Business and Economics (Vienna, Austria).

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Todd Hutchison

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Todd is an executive of the Australian law firm Balfour Meagher, a police-licensed investigator, and a digital forensic practitioner with Forensics Australia. Todd completed the world's first bachelor's degree in legal project management and is currently completing his doctorate. He is an international bestselling author and an adjunct Associate Professor teaching contract law, project management, and international business.

Todd is a founder of the International Institute of Legal Project Management and its Global Chairman. He is a former global Board Director of the Project Management Institute, and a Fellow of both the Project Management Institute and the Australian Institute of Project Management.

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Aileen integrates successful business skills in supporting lawyers and their organizations to enable them to deliver professional services more effectively. She draws on decades of experience as a practicing lawyer, entrepreneur, Big 4 Accounting Firm partner, and industry-leading specialist in Legal Project Management.

She is the co-founder of Law Strategy Coach, a blended learning and coaching platform that supports lawyers in acquiring skills not learned in law school.

Aileen spearheaded the IILPM's development of a competency model for legal project managers. She is also the co-chair of the well-established LPM committee of CLOC.

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Anna Marra is an Italian lawyer with a Masters in International Affairs from the Institute for International Political Studies in Milan. In 2006, she moved to Spain to work as a project management trainer and consultant for private and public organizations. Anna pioneered the implementation of Legal Project Management to improve performance in law firms and legal departments.

Anna is the Director of the Legal Project Management Programs at IE Law School (Madrid, Spain) and co-director of the Legal Management Program LATAM. She is a member of the IILPM's Global Advisory Council and an Accredited Training Provider. She teaches courses on LPM and LPI in Spanish, Italian and English.

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Caitlin Moon

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For two decades, Caitlin “Cat” Moon practiced law and learned from experience how project and process management can transform the delivery of legal services.

She is currently the Director of Innovation Design at Vanderbilt Law School, where she also directs its executive education platform for practicing legal professionals.

Cat teaches lawyers and law students how to leverage human-centered design to reimagine the delivery of legal services.

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Nicolene founded SchoemanLaw Inc in 2007 and is the firm's Managing Director in Cape Town, South Africa. She has built a firm committed to providing solutions that are practical, lawful and make good business sense. For this reason, the firm offers various training, content management, and implementation options, regardless of the industry or size of the business involved.

As an Accredited Training Provider, Nicolene has developed online Legal Project Management Courses that include virtual facilitation and mentorship sessions.

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David is the co-founder of Gimbal Lean Practice Management Advisors and the LeanLegal® Academy. He's a certified Business Made Simple coach, Lean Six Sigma expert and lawyer with decades of experience in Canada, Europe, and the UK. David's profound knowledge of the practice, and the perspective he gained as a client, helps lawyers improve their practice, performance, and profitability.

David is a global leader in the application of Lean to the legal profession, an Accredited Training Provider, and Global Advisor to the IILPM on Legal Process Improvement. He facilitates process improvement projects across North America, coaches entrepreneurial lawyers, and teaches LPM and LPI through in-person, virtual, and on-demand courses.

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Antony is a solicitor (England & Wales, non-practising) with post-graduate level qualifications in law, project management, and computing.

Since 2012, Antony has focused on delivering legal project management training and consultancy services via his company, Legal Project Management Limited. Before January 2020 all of Antony's training was delivered face to face. Since then, he has regularly run IILPM certification courses via Zoom and has developed 'on-demand' non-certification courses, made up of pre-recorded videos and live Zoom sessions.

Antony's IILPM certification training groups have a maximum size of 12 as his training style incorporates a lot of workshops and practical exercises.

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